



Office of Financial Aid
1301 College Ave., Lee Hall
Fredericksburg, VA 22401
Telephone: (540) 654-2468
Fax: (540) 654-1858

Special Circumstance Request

Deadline for submission:

fall: October 1 spring: February 15

summer: No Appeals Accepted

The Financial Aid Office requires that certain documents be provided to support you and your parent(s) or (if applicable) you and your spouse's claim of special circumstances. The Financial Aid Office begins the review process with an evaluation of the information that you have submitted on your Free Application for Federal Student Aid (FAFSA). The Financial Aid Office will evaluate the documents you submit along with your FAFSA information to determine if you are eligible for any financial aid adjustments.

Your family situation must meet one of the criteria used by the University of Mary Washington to determine special circumstances. If your family meets a special circumstance requirement in the 2013-2014 award year, your eligibility may be recalculated using expected income from 2013.

The decision reached by the Financial Aid Office is final and cannot be appealed to the U. S. Department of Education.

Student Name: _____ Student ID #: _____

Address: _____ Telephone: _____

_____ Date: _____

PART I: Instructions for Completion

- **IMPORTANT!!!** Federal regulations require our office to complete a full verification of the Free Application for Federal Student Aid (FAFSA) prior to completing a special circumstance request. In addition to the documents listed below, we will need signed copies of the 2012 federal tax transcripts for parent(s) and student. If you choose, you may also select to do the IRS data retrieval through the student Free Application for Federal Student Aid (FAFSA).
- Complete only the sections that apply to your situation and provide all required documentation.
- Provide all requested signatures. Write student name and student ID number at the top of all documents.
- If additional information is required, you will be notified within five business days of initial review.

PART II: Explanation of Situation

Please check one box that corresponds to your situation:

SITUATION	DOCUMENTATION REQUIRED
<input type="checkbox"/> Divorce or Separation	<ul style="list-style-type: none">• Copy of divorce decree/separation papers or evidence of separate living accommodations (ex. Current utility bills showing separate residences).• Signed copy of 2012 Federal Tax Return and W-2 forms• 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/)• Other documents as listed in Part I of this document, which are necessary for verification.
<input type="checkbox"/> Death of parent/spouse thereby reducing income	<ul style="list-style-type: none">• Photocopy of death certificate• Signed copy of 2012 Federal Tax Return and W-2 forms

	<ul style="list-style-type: none"> • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.
<input type="checkbox"/> Loss of Employment for Independent Student, Spouse or Parent (Loss of employment must occur 16 weeks prior to request.	<ul style="list-style-type: none"> • Letter of separation from employer • Copy of last pay stubs from both previous and current jobs if applicable • Copy of unemployment benefits or statement of ineligibility for unemployment benefits • Signed Copy of 2012 Federal Tax Return • All family 2012 W-2 forms and most recent pay stub • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.
<input type="checkbox"/> Loss of other income This must be a complete loss of the benefit or income. The untaxed income or benefit must have been from a public or private agency, company, or person because of a court order. Do not include Veterans' educational benefits.	<ul style="list-style-type: none"> • Statement of benefits (e.g. Social Security benefits) • Letter from parent paying child support or Friend of the Court including stop date and amounts • Other applicable documentation to verify loss of other income • Signed copy of 2012 Federal Tax Return • All family 2012 W-2 forms and most recent pay stub • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.
<input type="checkbox"/> Medical expenses (only applies if you filed a 1040 Schedule A)	<ul style="list-style-type: none"> • Signed copy of 2012 Federal 1040 income tax return including Schedule A • All family 2012 W-2 forms • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.
<input type="checkbox"/> Disaster or Disability	<ul style="list-style-type: none"> • Date disability or disaster occurred • Proof of disability (medical documentation, letter from vocational rehabilitation, etc.) • Copy of current year-to-date pay stubs from all jobs • Proof of disability income • Verification of a disaster • Signed copy of 2012 Federal Tax Return and W-2 forms • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.
<input type="checkbox"/> Other	<ul style="list-style-type: none"> • Provide all supporting documentation • Signed copy of 2012 Federal Tax Return and W-2 forms • 2013-2014 Verification Worksheet (available at http://adminfinance.umw.edu/financialaid/) • Other documents (listed in Part I of this document) necessary for verification.

Name of person who has suffered this circumstance: _____

If not the student, please list the relationship: _____

PART III: Personal Statement

Please give a detailed description of the event(s) that have occurred creating a change in need.

PART IV: Reporting of Income

Complete the following income chart to reflect actual 2012 income and projected income for the year 2013. Use "zero" or N/A where appropriate. Do not leave any lines blank.

	Actual 2012 Income From Work	Actual 2012 Untaxed Income *	Source of Untaxed Income	Projected 2013 Income through 12/2013 **	Source of Projected 2013 Income through 12/2013**
Father (Dependent Students)	\$	\$		\$	
	\$	\$		\$	
Mother (Dependent Students)	\$	\$		\$	
	\$	\$		\$	
Student	\$	\$		\$	
	\$	\$		\$	
Spouse (Independent Students)	\$	\$		\$	
	\$	\$		\$	

*Untaxed income can include payments to tax-deferred pension and savings plans, child support received, housing, food, and other income not reported on your federal tax return.

**Projected 2013 income must be supported by accompanying documents

PART V: Certification Statements and Signatures

I swear under penalty of perjury that all of the information contained in this application is true to the best of my knowledge. I understand that providing false or misleading information in an attempt to obtain federal financial aid can result in a fine of up to \$20,000 and/or incarceration. **I understand that failure to provide the required documentation may result in denial of this application.**

Student's Signature: _____ Date: _____

Mother's Signature: _____ Date: _____

Father's Signature: _____ Date: _____

(If you are a dependent student, it is required that one parent also sign the form.)

Be certain you have completed the following before submitting your request to us:

1. Provide a detailed letter of appeal that explains how your family's financial status has changed and indicate the situation that applies by checking the appropriate box on the front of this form.
2. Please complete all sections (*both sides*) of this form.
3. Attach required documentation.

FOR FINANCIAL AID OFFICE USE ONLY

Initial Reviewer: _____ **Date:** _____

Secondary Reviewer: _____ **Date:** _____

Reason: APPROVED DISAPPROVED

	Current Income	Current Taxes Paid	Adjusted Income for PJ	Adjusted Taxes Paid for PJ
Parental Information	\$	\$	\$	\$
Student Information	\$	\$	\$	\$
Spouse Information	\$	\$	\$	\$

Notes:
